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ABSTRACT

Motivated by the widespread assumption that voluntary, independent inter-district resource sharing is a strategy for improving educational opportunities in rural areas (with little or no cost to the operation of the school district), this paper critically examines resource sharing in New York State. A review of the literature between 1960 and the present reveals that sharing has been alleged to contribute to flexibility, autonomy, curricular offerings, and lower costs. Among other lines of research it has been argued that sharing would more likely occur when there is no substitute for a given essential service, and some findings indicate the most successful sharing programs are those involving special education, gifted student programs, and vocational or agricultural programs. The discussion draws on business administration literature and experience to supplement what little educational administration research is available on sharing arrangements. A 1982 New York State Education Department survey reveals over 30 cases of 2 or more districts sharing arrangements outside the Boards of Cooperating Education Services. A case study illustrates problems associated with resource sharing including fairness, community support, student interests, managerial time, teacher involvement, and cost effectiveness. The paper concludes that shared services will not likely develop without state support, which could take the form of aid in identifying relative costs of different programs, providing financial incentives, choosing programs to develop and maintain, and developing sharing contracts. (NEC)

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Sharing Among Separately Organized School Districts: Promise and Pitfalls

by
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Organizational Alternatives for Small-Rural Schools
In New York State*

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INTRODUCTION

Cooperation is extolled by many as a way of reducing duplication and promoting efficiency in today's world of declining resources and expanding demands. The idea of inter-organizational cooperation has long been familiar to businesses and social service agencies (Levine & White 1961). Recently, the idea of inter-agency cooperation has been proposed for education by academics (Sher 1977) as well as practitioners (Schmidt 1983; Willard 1985), as a strategy for addressing the problems of small and rural school districts. These advocates claim that resource sharing can serve small school districts as a means of expanding services, maintaining academic quality and reducing costs. Alluring as these claims are, it is not obvious that they will easily be realized; in fact, there is good reason for caution.

This paper critically examines resource sharing in New York State, both conceptually and practically through the use of a case study and a review of existing literature. The study is motivated by the wide spread assumption that inter-district resource sharing is a strategy for improving educational opportunities with little or no cost to the operation of the school district. The discussion draws on business administration literature and experience to supplement what little educational administration research is available on sharing arrangements. The paper concludes with consideration of several feasibility enhancing recommendations for sharing programs between school districts.

THE PROBLEM

Concern over quality of education issues is widespread in this country, but small rural schools in particular are experiencing problems. Faced with declining enrollments, escalating costs, expanding curricular demands, and the taxpayers' unwillingness to raise taxes, these schools are having trouble providing students with the quality of education necessary to compete in today's society. For example, one small school in New York is already working with a nine period schedule, allowing for only two minutes between classes. This school, as well as many others, will find it difficult to adjust its schedule to accommodate the curricular demands of the State's new Regents Action Plan. If these small school districts are going to survive they will have to change, but past efforts to introduce education innovations into school have not been very successful.

The problem is not insignificant. In New York State, over 32% of the school districts have enrollments of fewer than 1000 students, and 52% of the school districts have fewer than 1500 students. By most definitions these districts constitute small school districts. Wherever possible, the strategy dealing with the predicament of decline in these small school districts has been toward the reorganization several small school districts into larger organizational units. In many circumstances, however, it has not been feasible to reorganize these small school districts because of their physical isolation. In other cases community members, perceiving their schools as an important source of community identity and sensitive to issues of local autonomy, have been reluctant to accept school district reorganization.

INTER-DISTRICT RESOURCE SHARING

Recently a new strategy for school improvement, called inter-school district sharing, has been proposed as a solution to many of the problems facing rural and small schools. These programs are not those developed under the existing Boards Of Cooperating Education Services (hereafter, BOCES). Rather, they are voluntary arrangements planned independently between school district managers. In this regard we will not discuss Federal, State and local revenue sharing programs, nor will we examine cooperative arrangements between businesses or colleges and public schools.

School district sharing refers to voluntary cooperative agreements between two or more school districts, where resources are combined to produce a shared but improved educational program. Generally, two or more school districts combine their resources and coordinate their efforts to develop and maintain programs in any combination of academic classes, extra-curricular activities and administrative areas. A French teacher, then, may travel between two school districts, teaching in one school in the morning and in the other in the afternoon. In another case, students may be bused to another school district for their shop program, taking their history classes in that district as well. Other districts have shared the costs and services of band leaders, counselors, sports teams, special education teachers and even school administrators.

Inter-district resource sharing is described as a strategy for improving educational opportunities at little or no extra cost to school district operation. One citizen we interviewed in a district with an extensive inter-district sharing program noted that sharing programs are often developed in order to enhance curriculum but have the added benefit of allowing districts to save money on teaching staff, transportation and teaching materials with no concomitant decline in local autonomy. She sums up with this comment:

> These cooperative ventures demonstrate that when neighboring school systems band together, top-quality education and extra- curricular activities not only can be preserved, they even can be expanded.

This attitude about sharing is widespread. For example, one District Superintendent asserted that:

> It is important that the rural community recognize that all children are entitled to a quality education...with today's ever-diminishing base of resources, the only way possible for any local school system to keep pace is through a system of sharing. It is more necessary than ever to find the most economical approach possible to meeting today's ever-increasing and complex demands (Schmidt, 1983 pp. 128- 130).

This superintendent listed 16 'exemplary' programs from around the country as evidence of the success of sharing programs. He offered these

programs as examples and models to administrators and boards interested in sharing and concluded:

> When one considers the possibilities of interdistrict cooperation there seems to be no limit. The limits are only stymied by the community's resistance to this kind of effort and the willingness of the staff and people involved to be creative and ingenious enough to establish such programs.

These sentiments are widespread. For example, one advocate of sharing from Illinois, listed over 100 sharing programs and argued "The advantages are obvious, the only barrier to successful sharing programs is the willingness of the school district manager to organize them." (Willard, 1984)

REVIEW OF THE LITERATURE

Cooperation may not, however, be so easily achieved. A search of the literature between 1960 and the present from the ERIC system on inter-district sharing revealed that the subject has been a topic of interest for over 25 years. Given the financial problems that many school districts faced in the last decade, one would expect to find more reports about sharing today than in the 1960's. In fact, this is the case. Of the 57 articles on sharing revealed by the ERIC search, 32 (or 56 percent) were submitted during the past five years. However, the ideas described in the articles of the 1960's about sharing are almost identical to those given today. Most of the articles amount to broad statements about the virtues of sharing or cursory descriptions of successful sharing experiences. Throughout this period sharing has been alleged to contribute to flexibility, autonomy, curricular offerings, and lower costs. Noteworthy for their absence are independent evaluations of short as well as long-term consequences of inter-district sharing. There is little evidence in the literature of a growing understanding of the sharing alternative.

In 1982, the New York State Education Department, using a survey questionnaire, found evidence of over 30 cases of two or more districts involved in sharing arrangements outside of BOCES. While BOCES districts were formed to facilitate the sharing of educational services among separately organized districts, there are at least four reasons why a district manager may decide not to work through a BOCES:

1) The BOCES Superintendent's role is one that works directly with the local district managers but is directly accountable to State authorities; the BOCES superintendent is the State Education Department's representative in the field.

2) The feeling of lack of control by the district managers. The BOCES is believed by some to focus on the larger programs requested either by larger districts or by large numbers of small districts.

3) Many districts are so far from a BOCES center that it is impractical for them to participate in their programs.

4) The need to accept the BOCES salary scales can cause problems when salaries offered by an individual district are substantially lower. When teachers with the same characteristics work side-by-side draw substantially different salaries simply because one is a BOCES employee, morale problems can arise. Moreover, the higher BOCES salaries can make participation prohibitively expensive for the low salary districts.

Many of these sharing arrangements are informally contracted and planned. For example, in the western part of New York State, two districts share students between one school's special education program and the other school's agricultural program. The arrangements were made, according to one of the school superintendents, because of the disproportionate cost of sending the few students enrolled in the agriculture program to the BOCES. The neighboring school operated agricultural program but did not have the facilities for a self contained special education room. Both district supervisors estimated that an exchange of students, between the districts, would be a simple, cost effective means of providing the services they needed while keeping paper work to a minimum and other school officials out of their business.

This arrangement illustrates several important aspects of sharing programs. First, the idea of mutual benefit is fundamental to the agreement. This does not, however, require that goods of equal value be exchanged. In fact, research on inter-agency resource sharing suggests that if both agencies have identical resources then very little sharing takes place (Hall, 1977). Likewise, if both agencies have similar needs and must compete for the same limited resources then sharing agreements become more problematic. Successful sharing and cooperation results, according to Beber (1984), "...when each party benefits by giving up something valued less than that which it gains." (p. 16). The above example illustrates this point, and according to Beber (1984) and Hall (1977) represents an exchange of complementary goods.

Not all shared services are complementary exchanges. Recognition needs to be given to the fact that sharing arrangements are often more competitive than mutually rewarding exchanges.

The early work in the study of inter-organizational relationships was carried out by Levine and White (1961) who stressed goal attainment as the basis for the exchange relationship. The exchange was characterized as a voluntary activity between two organizations usually under conditions of resource scarcity. This is to say that the foundation of sharing services is based on the idea of mutual benefit: that the leadership of each organization is internally motivated because each perceives that both will be able to attain their respective goals. Levine and White emphasized that inter-organizational exchanges are contingent upon an open market where both

agencies have access to the resources they need to maintain their organization.

This theoretical perspective, the exchange theory, has been helpful explaining why some agencies accept sharing relationships. The point is that services and resources are shared in pursuit of common goals and mutual benefit. Hall (1977) and Schmidt and Kochan (1977) both point out, however, that not all agencies faced with an opportunity engage in sharing relationships, nor are all sharing relationships mutually beneficial.

A second line of research has explored a power dependency approach to inter-organizational relations. According to this model, the motivation for interaction is seen as asymmetrical. The leadership of one organization is motivated to interact, while he other is reluctant. External pressure, or power, is applied to induce the reluctant organization into the relationship. Bargaining and conflict are the typical consequences of this type of forced cooperation.

Benson (1975) proposed a power dependent approach where he related the political-economic substructure to inter-organizational relations. He argued that organizations seek an adequate supply of money and authority to fulfill program needs, maintain their political domain, and defend their autonomy as an organization. Benson attacks the notion of mutual benefit as improbable, which he argues would require domain consensus, ideological consensus, a positive evaluation of the other organization, and cooperation among workers in order to succeed. In the case of schools, these issues would, according to Benson, be linked to the broader political-economy within society. Consequently one could hardly expect that a wealthy and poor school district would share services on a voluntary, mutually beneficial agreement. Rather, Benson's conception of sharing would predict that sharing would occur only when one school district had resources that another needed in order to further some specific goal.

In business, one of the fundamental assumptions that guides research about inter-agency sharing is that organizations strive to maintain their autonomy. This is obviously an important issue for school districts as well. Autonomy is defined as freedom of choice. Thus as school districts become involved with one another in a sharing relationship, they tend to lose some of their freedom to act independently. Research about inter-agency sharing suggests that organization decision makers would prefer not to become involved in a sharing program unless they are compelled to do so, either by a scarcity of resources or by the demands of specialization (Van de Ven & Walker, 1984; Hall 1977).

Jacobs (1974) accepted the notion that agencies want to maintain their autonomy but proposed that instead of discussing motivational interests in sharing one should consider whether an agency can do without those resources or whether there is another supplier. He called the concepts: "essentiality" and substitutability". With regard to school district sharing, Jacobs would predict that District A's willingness to share is directly proportional to the essentiality of the resource for district A and the control of it by district B, and inversely proportional to the

availability of those resources form other suppliers. Jacobs argued that sharing would most likely occur when there was no substitute for the service required. These findings are consistent with those of Futrell (1984) and Olsen (1980) who both found that the most successful sharing programs were those around special education, gifted student programs, and vocation or agricultural programs.

THE CASE STUDY

In the following case study elements of each of these theoretical perspectives will be evident. After presenting the evidence from the case study a more generalized topology of sharing will be presented and discussed. From this analysis several specific recommendations and concerns will be identified and discussed.

Steamville and Toppenish are two small school districts (each enrolls fewer than a thousand students) which are situated close to a large city in New York State. One school district, Toppenish, is considerably wealthier than the other and spends over 10,000 dollars a year per student on education. The sharing of services, first instituted in 1980, was, according to the superintendent of schools at Steamville, planned in response to the steady declining enrollments and the increasing costs of maintaining certain programs so as "...to provide the students of both districts with as many education opportunities as possible."

According to superintendent's of these schools the first shared program, between these districts, was a sports program. Both schools were having trouble fielding enough football players, so they joined forces to save the football program. Since these early efforts the districts have consolidated many programs including several sports programs, academic programs, a school newspaper as well as debate teams and choirs.

According to the superintendent of Toppenish, "Cooperation between the schools, the students and the two communities make all of these things possible." The enthusiasm for these programs is evident in the comments of the sports director from Steamville, who summed up the cooperative planning process by saying,

> We tried to maintain the identities of both schools, while at the same time, by sharing resources offer as many programs as possible for the benefit of all those involved.

The superintendent Toppenish concluded,

> When there is an opportunity to improve on a program by combining, the opportunity should be taken as soon as possible.

These comments are consistent with our claim that educators see sharing as a relatively simple trouble-free idea that can solve the problems of small

rural schools. Proponents of sharing often offer long lists of exemplary programs with out recognizing the varying problems and goals of different programs. Distinguishing among programs, as simple as administrative, curricular and extra-curricular programs, helps identify who is likely to benefit from a sharing program. Further, these distinctions help identify problems which are particular to one kind of sharing program but not the other.

The point is well illustrated in the interviews with teachers, from Steamville/Toppenish, who recognize that an over- production of courses or sports programs actually is detrimental to the opportunities of students. One coach referred to the situation where a girls' field hockey was included in a shared program along with girls' soccer. He commented that both teams compete for the same set of athletic girls. Since both sports are played at the same time the result is that neither team is able to field a winning team. He had special concern for a talented young athlete who, he thought, would not have the opportunity to play on a competitive team because neither team was able to field enough good players.

This example shows how sharing programs are often in competition for students, instructors, resources and community interest. Recognition of these competing interests helps distinguish the varying costs associated with each program. Olsen's (1980) research found that cost was one of the main concerns school district managers had about becoming involved with sharing programs. Interviews with superintendents from districts in New York State revealed that one of the primary concerns shaping agreements is the relative cost of one program to another. These superintendents noted one of the costliest inputs to sharing programs was the amount of time it took each of them to organize and maintain programs. Comments like these are consistent with the findings of Olsen (1980) and Beber (1982) who both identified manager's time as a significant, and often over looked cost to sharing.

Recognition of these costs has implications about what kind of sharing programs are developed. According to one group of four New York State school superintendents who are involved with sharing a variety of services, (including a business manager, in-service training programs and bus maintenance services), shared administrative programs are the easiest and least costly because few people are involved with the decision, and goal consensus is not a major problem. Shared curricular programs, by comparison, require substantial efforts to organize large numbers of people, materials, curriculum, and transportation. Further, the issue of educational goals and methods becomes a point of debate that must be resolved. Finally, these superintendents pointed out that these programs require a high degree of maintenance in order to survive from year to year.

This issue of survival, and associated growth, is entirely missing from the educational administration literature or discussion about shared services. The case study of Steamville/Toppenish helps illustrates the problems associated with this issue. Once a program is developed there are any number of reasons that it may not be continued. In Steamville, for example, the teacher who organized the advanced English program and taught it at both schools, retired and neither school had a teacher willing to fill the

position. Another problem is the waxing and waning interest of students from year to year. The fluctuating number of students is another problem, especially for small schools where any change can represent a significant percentage of the class. In the case study of Steamville and Toppenish, the varying number of students between one senor class and the following junior class resulted in the termination of several shared extra curricular programs.

No less a problem is that of community support. This is a complicated issue determined partially by who has been or will be benefiting from shared services. The case study in Steamville/Toppenish highlights the inequities that can result from shared services in several ways. For example, Toppenish, the wealthier of the two districts, does not, currently, send any of its students to Steamville, although Steamville sends many of its students to Toppenish. The reasons for this fact are not obvious but one can not ignore the socioeconomic differences between the two districts. The result is that many Toppenish teachers, students and community members feel that Steamville students taking courses at Toppenish do not return much academic or social stock for the courses and opportunities they gain by coming to Toppenish. There is satisfaction, however, with students, like Tom A., who takes courses at Toppenish and wrestles there as well. Tom is a State champion wrestler and a real asset to the Toppenish team. While community members and other students feel that Tom's example constitutes a fair exchange, it raises questions about the possibilities of wealthier districts unfairly attracting, or even recruiting, students from poorer districts by developing special programs to meet the specific student's interest.

These issues of fairness, community support, student interest, teacher retirements, and managerial time are all extra costs, so to speak, which make organizing curricular programs more difficult compared to administrative programs. As it becomes more obvious that sharing programs vary in cost and complexity, the claim that any sharing opportunity is a worthwhile one will become less convincing. Rather school site managers need to make choices about the range of sharing opportunities available to them. Obviously the choices about which programs to develop and how much to invest in them are complex questions that need to be resolved so that district managers can achieve some degree of efficiency and fairness.

The problem of cost-effectiveness is one about which superintendents appear to be cognizant. Olsen's research (1980), as well as Futrell's (1984) found that cost-effectiveness and quality of programs were the two most important considerations school district managers used to decide upon a sharing program. These determinations appear to be made individually. More recognition needs to be paid to the problem of how shared services interact with one another, how they affect other programs, and fundamentally, which programs are most needed to achieve some desired goal. The current philosophy of simply expanding whenever the opportunity exposes itself, ignores the relative costs of different programs and the likely interactions of programs toward some overall goal.

This discussion of shared services helps illustrate two basic dimensions along which shared arrangements can vary. The first dimension involves the

cost of the shared services. Some shared programs are simply more costly to operate than others. The second dimension involves the degree of formality that accompanies the agreement. The following topology helps to illustrate the point:

	low cost	high cost
informal	A	C
formal	B	D

Research about shared services indicates that as sharing programs become more costly (in terms of money, risk, complexity or uncertainty), formal agreements are required to ensure a successful exchange (Hall, 1977). Contractual agreements can help to resolve uncertainty about sharing arrangements. This is especially important when both districts are competing for the services of a single resource, such as athletic students, good teachers, a special program, or whatever. The details of salaries, insurance, office space, travel arrangements, and office hours for teachers are all important to the successful maintenance of any sharing agreement. Formal contracts define these aspects of an agreement and help resolve confusion that may result from unexpected problem.

Many of the sharing arrangements discussed in this paper (particularly those involving curricular programs) fall into the high cost category and according, to this analysis, are best achieved with a formal agreement (cell 'D'). Most of the descriptions of sharing arrangements suggest, however, that planners pay little attention to the cost of programs, and seem to assume that most shared programs are best arranged informally. Certainly many arrangements are so simple and inexpensive that they do not require formal contracts. This idea is represented in the cell 'A': informal/inexpensive. There appears to be a danger, however, in assuming that most sharing arrangements can be managed informally. The above topology suggests that greater concern should be given to those sharing arrangements that fall into cells 'B', 'C', and 'D'. The following conclusion outlines four of the recommendations for State support of sharing agreements.

CONCLUSIONS

If sharing is to be supported and developed as a strategy for school improvement, State officials will have to be aware of the reasons sharing arrangements are made and the tensions that destroy agreements. Further, if sharing agreements are to be promoted more attention will be needed identifying likely incentives for district managers as well as teachers involved with planning and operating such programs.

Research in business administration suggests that sharing arrangements are most likely to occur around some specialized service which is both

expensive and essential to the maintenance of the organization. Jacobs (9174), for example, argued that sharing occurs when the program is both essential and there is no substitute for the service. These findings are consistent with those of Futrell (1984) and Olsen (1980) who both found that the most successful education sharing programs were those that involve special education, gifted student, and vocational or agricultural programs.

Sharing does not begin simply as an act of goodwill; the problems of sharing are too great and the advantages too questionable to expect that it would be so simply adopted. Research in business administration has found that the more complicated and costly a sharing arrangement, the more necessary a legal contract becomes for making agrement to work successful. Legal contracts can be important for sharing agreements by defining the relative worth of the exchange. Further, legal contracts can reduce the confusion around retiring teachers and superintendents that might be instrumental in the organization and maintenance of a sharing program.

Sharing appears as a valuable strategy for improving the educational opportunities of students in rural and small schools. But shared services will not likely develop as a school improvement policy without State support. This paper identified four areas in which the State could assist the promotion and maintenance of inter-district resource sharing:

1) The State could help school site managers identify the relative costs of different programs.

2) The State could help provide financial incentives (tax breaks, salary bonuses, special recognition, etc.) for district to develop and maintain shared programs that contribute to a recognized and agreed upon educational goal. (This could act as a way of controlling districts from developing 12 irrelevant sharing programs while collecting incentive aid for doing so.)

3) The State could help school site managers make choices about which programs to develop and maintain, and thus ensure that students are given a broad range of opportunities.

4) The State could provide technical assistance for the development of sharing contracts which would otherwise be too expensive and difficult to accomplish for school site managers.

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